WORKING WITH BILANZ · MARC HASLBECK

Senior financial leadership, without the full-time seat

Bilanz gives nonprofit boards and executive directors the CFO they need but can't yet justify hiring: numbers they can trust, a budget and cash forecast to plan with, and board reporting that answers questions instead of raising them.

What I help with

Fractional or interim CFO
Monthly close review, variance explanations, and a finance lead at the table, ongoing or through a transition.

Budgets and cash forecasting
Operating budgets by program, 13-week cash forecasts and scenarios leadership can plan against.

Board and finance committee reporting
Clear financial packages, presented in plain language to the finance committee and the board.

Grant and fund accounting
Restricted funds, grant revenue recognition, HUD and state reporting, and audit readiness.

Grant pipeline
Foundation and public funding researched and scored for fit, tracked to the deadline in a shared workspace.

Systems, controls and housing
Chart of accounts, QuickBooks and close processes; real estate and affordable housing finance.

How we would start

1 · CONVERSATION
30 minutes, no cost
A Zoom or Teams call about what you have, what's pressing, and what the board needs.

2 · HEALTH CHECK
Fixed fee
A review of the books, reporting and controls, with clear findings and the few fixes that matter most.

3 · ONGOING, IF USEFUL
Monthly
Support sized to your organization at a nonprofit rate. Month to month, 30 days' notice.

About Marc

- Former CFO of Housing Assistance Corporation on Cape Cod, a HUD-funded nonprofit with about 120 staff; continues to advise HAC.
- Works with several smaller nonprofits, including Matthew 25 in Worcester.
- Earlier: CFO and VP Finance level roles at Grand City Property in Berlin (€650M real estate portfolio, finance team of 100+).
- Twelve years in the US, mostly in commercial real estate valuation. Degrees in management, economics and finance.

"Marc has given our board a forward-looking view of our finances and practical tools for reporting and planning. He brings big-organization financial discipline to a small nonprofit without the overhead."

Mark Ferrari, Board President, Matthew 25, Inc., Worcester

Book a 30-minute introductory call by Zoom or Teams. No cost, no obligation.

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